

Preparing for Transition

by Darylen Cote

As your term draws to a close and new officers are being elected, how will you as a current parent group leader make sure that the new officers are ready? Why is a smooth leadership transition important? How do you prepare new officers for the transition into their new roles?

Transition means more than simply replacing one able body with another. It also means the transfer of the organization's mission and vision from leader to leader and the assurance that the tools necessary for carrying out that mission and vision are transferred, as well.

Transition Planning

Planning for effective leadership transition can yield many practical benefits for your group. For one thing, it saves new leaders from wasting time reinventing tools, procedures, or systems for getting things done. It also maintains partnerships with key people or groups that have been crafted by you and your team or those that have gone before you. This kind of information is called "organizational knowledge," and without it, new leaders tend to struggle, redoing work that has already been done.

Passing on this knowledge minimizes confusion and reduces the lag time that can occur as new officers try to figure out what is going on. Without that transfer of knowledge, programs can lose momentum or even disintegrate. Shared information results in new leaders feeling confident rather than worried or disoriented as they assume their new duties.

A good transition plan can also give outgoing leaders a sense of closure. Without that closure, many of us tend to want to hang on, which is a perfectly natural tendency for committed



leaders. However, letting go is necessary for new leaders to move on in a healthy way.

Leadership Transition Tips

Begin to identify emerging leaders as early in the year as possible. Encourage potential leaders through your personal attention. Help them develop skills by delegating responsibility to them for specific tasks or projects, and modeling an effective leadership style. Cheer them on when they express any interest in running for office by sharing with them the benefits you have found in assuming a leadership position.

When new officers have been elected, orient them as a group with all of the outgoing officers. Not only will it help them understand and appreciate each other's roles; it may also help them begin building their own team.

Every group has its own timeline, but if you have at least a

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month or two between elections and handing over leadership, consider asking the current team to act as mentors. This kind of relationship would be a logical follow-up to a group orientation, or it could stand on its own. The process usually involves incoming officers shadowing current officers: watching, questioning, and working alongside their counterparts. Gradually, the incoming officers take over while the outgoing officers look on, offering assistance and ideas when appropriate.

Some self-reflection is also needed when thinking about the coming transition. Ask your current team to think back to their first weeks in office. What do they wish someone had told them? If you do this as a group brainstorm at an executive board meeting, each person can then focus on organizing information they wished for when they were new. You might ask each officer to create a binder specific to the needs of that office. Consider including some or all of the following information:

People. PTO membership list with contact information. School contact list, including administrators, faculty, and staff. Community liaisons. Fundraising information. Press contacts.

Documentation and Methodology. Constitution and bylaws. Membership recruitment flyers and methods. Training materials. Press clippings. Grants or other funding. Financial records. Invoices and contracts. Information about any special traditions, why and how they are carried out. Forms and form letters. Minutes and agendas from meetings.

Key Activities and Initiatives. Objectives from previous years. Status reports on ongoing projects. Ideas in the works.

Personal Notes and Observations. What worked. What didn't work. Challenges.

When planned and executed with generosity and grace, your goodbye to the parent group can be an inspiring, unifying gift that relieves organizational anxiety and leaves fertile ground for those who follow. ■

Darylen Cote is an education consultant and parent with many years of experience in leadership positions for community organizations. She holds an M.S. in educational leadership from the University of Southern Maine.

New Officer Checklist

☐ Meet with past officers

Schedule a meeting of new and old board members. Ask outgoing officers to give status reports on ongoing projects and share general information about how the group gets things done.

☐ Meet one on one with your predecessor

Schedule a meeting to obtain specific details about your office, and encourage other officers to do the same. Have the retiring leader walk you through the information in her PTO binder. Ask for advice on how to do the job most effectively.

☐ Schedule a social event for board members in a relaxed setting

Take some time to get to know one another outside of official PTO events. Discuss job descriptions and expectations and talk about personal strengths and weaknesses.

☐ Contact other parent group leaders in your area

Leaders at other schools can be a great source of information and support. Share fundraising information and program ideas with other leaders and sound them out on new ideas.

☐ Delegate

No one person can do it all. Sharing workload and responsibility at the beginning of your term sets the stage for success down the line. When officers delegate work, more volunteers become invested in the group and the parent group can get more accomplished.

☐ Communicate with parents

Use surveys, talk to people at pickup and drop-off, and solicit feedback at school events. Ask parents what goals, desires, and ideas they have for the school. The more information you gather, the better plan you'll create and the more success you'll have in implementing your ideas.

☐ Meet with the principal to discuss goals and establish a good working relationship

Get off on the right foot with the principal by letting her know you're working toward the same goals—a better school and a better education for the children. Assure the principal you'll respect boundaries on decisions the school should make and those parents can make.

☐ Spread the news

Update your list of officers at ptotoday.com to be sure you keep receiving PTO Today magazine and online updates. Renew subscriptions as necessary, change the signature card on your bank account, and notify the local newspaper when you change officers—you just might get a little free publicity.

Treasurer Year-End Checklist

Wrapping up the year:

Bookkeeping

- ☐ Schedule the annual audit.
- ☐ Follow up on any open items, such as outstanding NSF's, long-uncashed checks, and open payables.
- ☐ Prepare monthly treasurer reports and reconcile the account each month until the new treasurer is installed.

Organization

- ☐ Clean out your files according to these IRS retention rules:
 - 3 years—annual set of monthly treasurer reports
 - 7 years—annual set of bank statements, canceled checks or images, and check registers; IRS form 990/990EZ
 - Keep permanently—incorporation paperwork; nonprofit documentation; IRS determination letter; annual sets of meeting minutes and agendas; year-end treasurer's reports; annual auditors' reports
- ☐ Reorganize your day-to-day binder and replace it if necessary.
- ☐ Stock up on supplies such as financial transaction forms, coin wrappers, letterhead/envelopes, stamps, and blank checks if you're running low.
- ☐ Make a list of deadlines, such as state incorporation renewal, annual IRS 990/990EZ due date, insurance renewal, bonding renewal, PTO Today Plus renewal, and advance ruling period expiration (if applicable).
- ☐ Prepare an end-of-year report with suggestions for the next treasurer, budget ideas, pitfalls to avoid, and tips and hints.

Financial Services

- ☐ If necessary, change the authorized account signatures and the mailing address for the monthly bank statement.
- ☐ Review your bank fees: Is it time to change banks?

If you're transitioning to a new treasurer:

- ☐ Pass along your copy of the PTO Today Treasurer's Toolkit or similar manual.
- ☐ Set up at least two training meetings.
- ☐ Meet after the election to introduce your successor to her new job.
- ☐ Shortly before you officially leave office, train your successor in the details, including the computer software your PTO uses.
- ☐ Determine who will be responsible to prepare this year's IRS form 990/990EZ: you or your successor?
- ☐ Review the year's budget with the new treasurer, including your suggestions for next year. Draft a preliminary budget with her input.
- ☐ Introduce your successor to the principal, secretaries, key vendors, and banker.
- ☐ Be available to answer the inevitable questions, but don't take over the job. Remember, you're retired.

Year-End Committee Checklist

COMMITTEE:		YEAR:
CHAIRPERSON:	CONTACT NUMBER: () -	
COCHAIR:	CONTACT NUMBER: () -	
<p>I have enclosed the following (check all that apply):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Copy of all flyers—hard copy and computer files <input type="checkbox"/> Vendors used, contracts, and invoices <input type="checkbox"/> Budget and actual costs <input type="checkbox"/> Photographs <input type="checkbox"/> Planning issues <input type="checkbox"/> Number of volunteers needed <input type="checkbox"/> Suggestions for next year's chairperson <input type="checkbox"/> Other information 	<p>THE MOST IMPORTANT ADVICE I PASS ALONG IS:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	

Attach this form to a folder or binder with the key information your committee. Thank you for your help!

You're Elected! Now What?

by Craig Bystrynski

Whether you won by a landslide or one vote—with three recounts and a dispute over hanging chads—you face many challenges ahead. Getting off to a strong start can make all the difference. Here are some ways to do just that.

Meet with past officers—twice. The first time, have the new board get together with the old board. Talk about goals they were pursuing, projects underway, who they count on for help, and other broad issues. The second time, have new officers meet one-on-one with the past office-holders. The purpose of this get-together is to talk about how to do the job most effectively. Past officers often have systems in place, know the best contacts, and have other tips that can help new officers get off to a running start. They can be a terrific resource. Don't ignore it.

Reach out to other schools. Make contact with parent group leaders. Share fundraising information, program ideas, and give each other general support. Yes, there's someone going through the same things you are!

Get your board members together in a relaxed setting. Discuss job descriptions and expectations. Talk about personal strengths and weaknesses. Take some time to get to know each other. You'll be working together closely. When things get really busy, the foundation you lay now can really make a difference.

Begin delegating now. It's natural for a new president to want to have her finger on the pulse of everything that's going on. Delegating then begins when the amount of work becomes too overwhelming for one person, or one board, to handle. By



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then, finding someone to help can be almost as stressful as doing it yourself. By sharing the workload and responsibility now, you set the stage for success down the line. Giving more people a stake in your work means you can accomplish more.

When you delegate, follow these three keys: **First, focus on the results, not the method.** Communicate what you want to accomplish, and give the person you delegate to the freedom to develop a plan to accomplish that goal. **Second, set firm deadlines.** A few realistic checkpoints will allow you to keep track of what's going on without micromanaging. **Third, communicate limitations.** Is there a strict budget? Is time frame crucial? Make sure the person you delegate to has all the information she needs to accomplish the task.

Communicate with parents. Use surveys, talk to people at pick-up and drop-off, solicit feedback at school events. Ask parents about what goals, desires, and ideas they have for the school. Don't plan in a vacuum. The more information you gather, the better plan you'll create and the more success you'll have in implementing your ideas.

Meet with the principal to discuss goals and establish a good working relationship. Getting off on the right foot with the principal can make a world of difference. Tell him you're working toward the same goals—a better school and a better

education for the children. Tell him you'll respect boundaries on decisions the school should make and decisions parents can make. Tell him you know about the power of parent involvement and, with his help, you intend to harness that power to benefit the school, the staff, and the children—which will make him look good in the process!

Engage your sense of humor. It doesn't take long in a leadership position to learn one inevitable fact: Things don't always go as planned. You take pains to communicate an important message clearly, but it gets misinterpreted. You plan for every possible problem—except the one that occurs out of the blue. You envision exactly how an event will go, but somehow—you're still not exactly sure where—it gets derailed.

Simply put, you can't control everything. There are too many human variables in everything we do. When things go wrong, laugh and look for solutions. Stressing out makes things harder on you, and it has a bad effect on your all-volunteer troops, too. Instead, act as a problem-solver. Most times you'll get the result you were looking for, even though you traveled the road less taken.

Relax. Enjoy yourself and have fun. Even if things don't go exactly how you envisioned them, the work you're doing really makes a difference. ■

Top 10 Things You Should Know About Robert's Rules of Order

Bylaws:

A written document that defines the purpose of your group, its organizational structure, and the rules that govern the group. Bylaws should be customized for your group, published, and reviewed annually for revisions.

Amendments:

Formal changes to your bylaws.

Agenda:

A written list of items that will be covered during a meeting.

Minutes:

The written record of all business transacted at a meeting. Minutes should be kept for both executive board meetings and general PTO meetings.

Motion:

A formal proposal that the group take some specific action. Motions are voted on by the group. An idea at a meeting will often result in the presentation of a motion. A motion is the way to resolve a dispute, debate, disagreement, or open issue. Any member in good standing can present a motion to the group. A motion can be tabled if the group needs more time before voting on the motion. Tabling a motion suspends consideration until the group's next formal meeting.

Seconding:

When a member presents a motion, her idea must be supported by another member. The supporting member "seconds" the motion to indicate her support. After a motion is seconded, it should be discussed by the group. A motion cannot be voted on unless it is seconded.

Adjournment:

A formal motion to end a meeting. At the appropriate time, a member moves to adjourn, another member seconds, and the rest of the members voice their agreement. The secretary records the adjournment time in the minutes.

Quorum:

The minimum number of members that are required to conduct business at a PTO meeting. Quorum is specified in a PTO's bylaws.

Officers and Elections:

The bylaws should specify the elected officers of the PTO, their main duties, their terms of office, and the procedures by which they are nominated and elected.

Robert's Rules of Order:

Originally written by General Henry M. Robert in 1876, it is the most common form of parliamentary procedure in the United States. It was designed to keep business moving, protect the rights of members, and ensure polite behavior in organizations. A PTO's bylaws should specify that Robert's Rules of Order is the group's parliamentary authority. The complete version of RRO is hundreds of pages and covers every conceivable situation for the most complex organization. Many simplified versions have been published. Every PTO president should own at least one simplified version of Robert's Rules.